



## ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Probate Status Hearing Re: Filing of the Ninth Account

		<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b><u>OFF CALENDAR.</u></b> Ninth Account filed and set for hearing on 8/29/16.
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
<input type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
<input type="checkbox"/>	Not.Cred.	
<input type="checkbox"/>	Notice of Hrg	
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<input type="checkbox"/>	Sp.Ntc.	
<input type="checkbox"/>	Pers.Serv.	
<input type="checkbox"/>	Conf. Screen	
<input type="checkbox"/>	Letters	
<input type="checkbox"/>	Duties/Supp	
<input type="checkbox"/>	Objections	
<input type="checkbox"/>	Video Receipt	
<input type="checkbox"/>	CI Report	
<input type="checkbox"/>	9202	
<input type="checkbox"/>	Order	
<input type="checkbox"/>	Aff. Posting	
<input type="checkbox"/>	Status Rpt	
<input type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
		Reviewed by: KT
		Reviewed on: 6/29/16
		Updates:
		Recommendation:
		File 1- Blum

**Probate Status Hearing Re: Failure to File a Petition for Final Distribution.**

	<b>PUBLIC ADMINISTRATOR</b> was appointed Successor Administrator on 3/8/2008.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. <b>Need petition for final distribution or current written status report</b> pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
	<b>On 12/7/15 a Surcharge Judgment was entered</b> against the former Administrator Christopher O'Neal in the amount of \$128,500.00. Western Surety was ordered to pay the full amount of Christopher O'Neal's bond (\$50,000.00).	
<b>Cont. from</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
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<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
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<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
	<b>Declaration of Timothy Tomlin, attorney for Western Surety, filed on 2/29/16</b> states Western Surety has paid the sum of \$50,000.00 in satisfaction of the surcharge.	
	<b>Notice of Status Hearing</b> re: Filing of the Petition for Final Distribution was mailed to attorney Heather Kruthers on 4/8/16.	
		<b>Reviewed by:</b> KT
		<b>Reviewed on:</b> 6/29/16
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 2- O'Neal</b>

Attorney Alfred A. Gallegos (for Robert Salazar, maternal great uncle)

## Petition for Appointment of Temporary Guardian of the Person

			<b><u>General Hearing set for 8/25/2016</u></b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
			<b>ROBERT SALAZAR</b> , maternal great uncle, is Petitioner.		<p>1. Pursuant to Probate Code 2250(e), need <i>Notice of Hearing</i> and proof of five (5) court days' notice by personal service of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian</i>, or <i>Consent to Appointment of Guardian and Waiver of Notice</i>, or a <i>Declaration of Due Diligence</i> for:</p> <ul style="list-style-type: none"> <li>• Leonardo Lopez Herrera, father.</li> </ul> <p>2. Need proposed order and proposed letters of temporary guardianship.</p>	
			<b>~Please see Petition for details~</b>			
Cont. from						
	Aff.Sub.Wit.					
✓	Verified					
	Inventory					
	PTC					
	Not.Cred.					
	Notice of Hrg	X				
	Aff.Mail					
	Aff.Pub.					
	Sp.Ntc.					
	Pers.Serv.	X				
✓	Conf. Screen					
	Letters	X				
✓	Duties/Supp					
	Objections					
	Video Receipt					
	CI Report					
	9202					
	Order	X				
	Aff. Posting					
	Status Rpt					
✓	UCCJEA					
	Citation					
	FTB Notice					
			Reviewed by: LEG			
			Reviewed on: 6/29/16			
			Updates:			
			Recommendation:			
			File 3- Salazar			

Attorney Nancy J. LeVan (for Pamela L. Gordy, Conservator)

## Probate Status Hearing Re: Filing of the Third Account

		<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>OFF CALENDAR</b>  <i>Order Settling Third and Final Account of Conservator of the Person and estate filed 3/26/2015.</i>
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
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Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LEG
		Reviewed on: 6/29/16
		Updates:
		Recommendation:
		File 4- Gordy

**5 Amiah Tracy, Jaedyn Grover, Ryanna Grover & Miley Grover (GUARD/P)**  
**Case No. 11CEPR01093**

Petitioner Brown, Kim (Pro Per – Maternal Aunt)  
 Petitioner Brown, Anthony (Pro Per – Maternal Uncle)

**Petition for Appointment of Guardian of the Person**

<b>Amiah Age: 8</b>		<b><u>TEMPORARY EXPIRES 07/06/2016</u></b>  <b>KIM BROWN, and ANTHONY BROWN,</b> maternal aunt and uncle, are petitioners.  <b><u>Please see petition for details</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b><u>This petition pertains to Amiah Tracy &amp; Jaedyn Grover only.</u></b>  <b>Note:</b> A petition for guardianship was filed by Jovanna Vargas & Matthew Moreno, aunt and uncle, for Ryanna Grover & Miley Grover, the general hearing is set for 07/07/2016.  <b>Minute Order of 05/12/2016:</b> Petitioner is ordered to ask Kelly Grover, mother, the name of the minors' father(s) again. The Court orders that there shall be no visits to Kelly Grover until she appears before the Court.  1. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> <li>Father(s) (Unknown)</li> </ul> 2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> <li>Paternal Grandparents (Not Listed)</li> <li>Maternal Grandparents (Not Listed)</li> </ul> 3. Notice of Hearing filed 05/13/2016 indicates that a Sharon Trihub and James Grover were personally served on 05/12/2016 however it is unclear what their relationship is to this case.
<b>Jaedyn Age: 6</b>			
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
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<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input type="checkbox"/>	<b>Aff.Mail</b>	x	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
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<input type="checkbox"/>	<b>Conf. Screen</b>		
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<input type="checkbox"/>	<b>Objections</b>		
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<b>Reviewed by: LV</b>			
<b>Reviewed on: 06/30/2016</b>			
<b>Updates:</b>			
<b>Recommendation:</b>			
<b>File 5- Tracy &amp; Grover</b>			

Petitioner Young, Nathan (Pro Per – Father)

## Petition for Termination of Guardianship

<b>Age: 3</b>		<b>NATHAN YOUNG</b> , father, is petitioner.  <u>Please see petition for details</u>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Note:</b> Madelen Castanon, mother filed a Petition for Termination on 06/01/2016. The hearing is set for 08/01/2016.  1. Need Notice of Hearing.  2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Termination of Guardianship for: <ul style="list-style-type: none"> <li>Paternal Grandfather (Not Listed)</li> <li>Macy Fox (Maternal Grandmother)</li> </ul>
<b>Cont. from</b>			
	<b>Aff.Sub.Wit.</b>		
✓	<b>Verified</b>		
	<b>Inventory</b>		
	<b>PTC</b>		
	<b>Not.Cred.</b>		
✓	<b>Notice of Hrg</b>		
	<b>Aff.Mail</b> x		
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
✓	<b>Pers.Serv.</b> w/		
	<b>Conf. Screen</b>		
	<b>Letters</b>		
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
✓	<b>CI Report</b>		
	<b>9202</b>		
✓	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		
			<b>Reviewed by:</b> LV
			<b>Reviewed on:</b> 06/29/2016
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 6- Castanon</b>

		<b>BRUCE BICKEL</b> , was appointed Initial Trustee, of the Donald Kubota Special Needs Trust, Established 05/09/2013.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u><b>OFF CALENDAR.</b></u> <u><b>Second Account and Report of Trustee filed 06/30/2016.</b></u> <u><b>Hearing set for 08/09/2016.</b></u>  1. Need Second Account or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
		Order settling the First Account and Report of Trustee was filed on 07/24/2014.	
Cont. from		Minute Order of 07/24/2014 set this Status Hearing regarding the filing of the Second Account.	
Aff.Sub.Wit.			
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Notice of Hrg			
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9202			
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Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: LV	
		Reviewed on: 06/29/2016	
		Updates: 06/30/2016	
		Recommendation:	
		File 7- Kubota	



Petitioner Cosme Guadalupe Barraza (Pro Per, paternal grandfather)  
 Petitioner Maria Beatriz Aguirre (Pro Per, paternal grandmother)

**Petition to Fix Residence Outside the State of California**

		<p><b>COSME GUADALUPE BARRAZA</b> and <b>MARIA BEATRIZ AGUIRRE</b>, paternal grandparents and Co-Guardians of the Person appointed on 7/9/2015, are Petitioners.</p> <p>Father: <b>COSME BARRAZA, JR.</b>; personally served 6/11/2016. Consent to out-of-state move signed 5/25/2016.</p> <p>Mother: <b>SALINA ORTEGA</b>; personally served 6/11/2016. Consent to out-of-state move signed 5/25/2016.</p> <p><b>Petitioners request that the Court authorize the residence for the minor be fixed outside California to Tucson, Arizona, for the following reasons:</b></p> <ul style="list-style-type: none"> <li>• Petitioners' son lives in a four-bedroom home in Tucson;</li> <li>• Petitioners wish to move closer to their son, who will help them open a new restaurant;</li> <li>• Petitioner is a very experienced cook;</li> <li>• Petitioner will be retiring in two years and this is where they wish to retire.</li> </ul> <p><b>Petitioners state</b> the expected duration of the out-of-state move is more than four months, and the guardianship of the person or its equivalent will be commenced in the place of new residence.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note for background:</b> Minute Order dated 7/9/2015 from the hearing on the petition for guardianship states: The Court orders that Cosme Barraza, Jr., father of the minor, may not reside in the guardian's home and must move out by 7/19/2015. Furthermore, Mr. Barraza, Jr., may not be left alone with the minor.</p> <ol style="list-style-type: none"> <li>1. Petitioners do not state whether their son referred to in the petition is the father of the child, <b>COSME BARRAZA, JR.</b> The Court may require Petitioners to provide further information regarding their plans for moving closer to their son in Arizona, as it pertains to their son's living arrangements not violating this Court's order.</li> <li>2. <i>Proof of Service by Mail</i> of the Notice of Hearing filed 6/23/2016 states "homeless" as to the following persons, for which the Court may require <i>Declaration of Due Diligence</i> to be filed with the Court:           <ul style="list-style-type: none"> <li>• Inocencio Ortega, maternal grandfather;</li> <li>• Stacey Ortega, maternal grandmother.</li> </ul> </li> </ol> <p align="center"><b>~Please see additional page~</b></p>	
<b>Cont. from</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			
<input checked="" type="checkbox"/>	<b>Verified</b>			
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<input type="checkbox"/>	<b>PTC</b>			
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>			
<input type="checkbox"/>	<b>Aff.Mail</b>			X
<input type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
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<input type="checkbox"/>	<b>Conf. Screen</b>			
<input type="checkbox"/>	<b>Letters</b>			
<input type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			
<input type="checkbox"/>	<b>9202</b>			
<input checked="" type="checkbox"/>	<b>Order</b>			
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<input type="checkbox"/>	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input type="checkbox"/>	<b>FTB Notice</b>			

<b>Reviewed by:</b> LEG
<b>Reviewed on:</b> 6/30/16
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 8- Barraza</b>

**Note: If the *Petition* is granted:**

- Within 30 days of the move to Arizona, Petitioners must file with the Court and serve on all interested parties a *Post-Move Notice of Change of Residence of Ward* [GC-080]. File contains a blank form for Petitioners' use.
- Petitioners must establish a guardianship or its equivalent in Arizona within **4 months** of the date of the Court's order fixing residence outside California, pursuant to Probate Code 2352(d).
- A Status Hearing will be set on **Monday, January 9, 2017, at 9:00 a.m. in Department 303** for filing proof of the establishment of a guardianship in Arizona. Pursuant Local Rule 7.5, upon filing with the Court satisfactory proof of establishment, the status hearing will come off calendar and no appearance will be required.

**9 Kyla Chea, Nova Chea & Aikon Serey Chea (GUARD/P) Case No. 14CEPR00808**

Petitioner: Paul Chea (Pro Per – Paternal grandfather)

Petitioner: Siramalin Uth (Pro Per – Paternal grandmother)

Objector: Vuthy Chea (Pro per – Father)

**Petition for Appointment of Guardian of the Person (as to Aikon Serey Chea only)**

			<b><u>TEMPORARY EXPIRES 7/6/2016</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
			<b>PAUL CHEA and SIRAMALIN UTH</b> , paternal grandparents, are petitioners.	<b>This petition is as to AIKON SEREY CHEA only. (Petitioners were previously appointed of Kyla and Nova 12/18/2014.)</b>  <b>Note: A Cambodian interpreter provided services at the hearing on 5/25/2016.</b>  <b>Minute order dated 5/25/2016 states</b> Deputy serves a copy of petition on Vuthy Chea (father) in open court. Mr. Chea states his objection. Any objections are to be [filed] and properly served no later than 6/22/2016. Jennifer Dy (mother) states her consent. Matter continued for the remaining service defects.
			Court Investigator report filed 5/16/2016.	
Cont. from 052516			Objection to guardianship filed 6/23/2016 by Vuthy S. Chea (father).	
	Aff.Sub.Wit.		<b>See petition for details.</b>	
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	w/		
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	Sp.Ntc.			
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✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
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	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
				<b>Petitioner:</b> 1. Notice of Hearing filed 6/16/2016 for Sameang Dy (maternal grandfather) is incomplete at #1 (name of person who filed the petition), #4b (address of court where hearing is to be held), and #2 of the proof of service (address of person serving the documents).
				<b>Objector:</b> 1. Need proof of service of objections on: a. Paul Chea b. Siramalin Uth
				<b>Reviewed by:</b> SEF
				<b>Reviewed on:</b> 6/29/2016
				<b>Updates:</b>
				<b>Recommendation:</b>
				<b>File 9- Chea</b>

## **Probate Status Hearing RE: First or Final Account**

<b>DOD: 1/21/15</b>	<b>PUBLIC ADMINISTRATOR</b> was appointed as Administrator with full IAEA authority on 5/6/15.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
	Letters issued on 5/21/15.	
	I & A filed on 7/9/15 showing the estate valued at \$165,000.00	
<b>Cont. from</b>	<b>Minute order dated 5/6/15</b> set this status hearing for the filing of the first account or petition for final distribution.	
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
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<b>Letters</b>		
<b>Duties/Supp</b>		
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<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> KT
		<b>Reviewed on:</b> 6/30/16
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 10- Ward</b>

## Petition for Determination of Entitlement to Estate Distribution

<b>DOD: 1/20/15</b>		<b>DEBRA IRENE BYRUM</b> , Niece, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Note:</b> A status hearing was set for 7/21/16 for the filing of the first account or petition for final distribution by Public Administrator.  <b>1. Need Order.</b>
	<b>Aff.Sub.Wit.</b>		
✓	<b>Verified</b>		
	<b>Inventory</b>		
	<b>PTC</b>		
	<b>Not.Cred.</b>		
✓	<b>Notice of Hrg</b>		
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	<b>Letters</b>		
	<b>Duties/Supp</b>		
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	<b>Video Receipt</b>		
	<b>CI Report</b>		
	<b>9202</b>		
	<b>Order</b>	x	
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		
<p><b>FRESNO COUNT PUBLIC ADMINISTRATOR</b> was appointed Administrator with Full IAEA on 5/7/15. Per Declaration filed 5/6/15, the only family information found in the decedent's apartment identified his mother, Beatrice Madsen (DOD November 2000) and his brother, Curtis Scott (DOD 8/30/07).</p> <p><b>Petitioner states</b> she is a niece of the decedent and is entitled to distribution pursuant to Probate Code §§ 6402(c) and 240. The decedent died without a spouse or issue. His father is unknown to Petitioner. Petitioner has no knowledge or memory of ever meeting the decedent's father, who would have been Petitioner's paternal grandfather.</p> <p>The decedent was 80 years of age at his death. Declaration of Susan Nesbitt of the Fresno County Public Administrator's Office shows she checked the Terrorism Liaison Office (TLO) website for heirs and found no information about the decedent's father, but did find information about his mother, Beatrice Linda Madsen, DOD 11/21/00.</p> <p>Petitioner sought the assistance of Attorney E. Terrance Woolf to conduct an ancestry search online, which revealed that the decedent's family had come from the State of Oklahoma. He retained VitalCheck, the company authorized by the Oklahoma Division of Vital Records, to search and copy birth and death records to obtain a copy of the decedent's birth certificate, but no records could be located in the State of Oklahoma. See Declaration of E. Terrance Woolf attached.</p> <p style="text-align: center;"><b><u>SEE PAGE 2</u></b></p>			
			<b>Reviewed by:</b> skc <b>Reviewed on:</b> 6/30/16 <b>Updates:</b> <b>Recommendation:</b> <b>File 11- Scott</b>

## Page 2

**Petitioner states** she has no information or belief that anyone has heard from the decedent's father for more than five years, and Evidence Code §667 establishes a presumption of death for a person who has not been heard from in five years. Petitioner believes the Court should find that the decedent's father predeceased the decedent.

Petitioner states the decedent had one sibling, Curtis Otis Scott, DOD 8/30/07, who had three children: Debra Irene Byrum (Petitioner), Curtis Lawrence Scott, and Phyllis Christiansen Boyd (DOD 12/23/13). Phyllis Christiansen Boyd had two children: Justin Alan Nickenson and Trisha Pearson Col.

Pursuant to Probate Code §§ 6402(c) and 240, Petitioner states the decedent's estate should be distributed 1/3 each to Debra Irene Byrum and Curtis Lawrence Scott, and 1/6 each to Justin Alan Nickenson and Trisha A. Col.

Petitioner states the costs and attorney's fees incurred in bringing this petition should be equitably born by all entitled to distribution and should be paid from the estate.

**Petitioner prays for an order that the persons entitled to distribution of the estate of the decedent are as stated above; and that the Costs and attorney's fees incurred in bringing this petition shall be paid from the estate of the decedent. Attorney shall present a petition to the Court for approval of those fees and costs and the estate shall pay those fees and costs when approved by order of the Court.**

## Probate Status Hearing RE: Filing of the Inventory and Appraisal

<b>DOD: 09/30/14</b>	<b>DON LEMLY</b> and <b>LINDA JENVEY</b> , son and daughter, were appointed co-administrators with full IAEA and without bond on 07/01/15.	<b>NEEDS/PROBLEMS/COMMENTS:</b>										
		<b>Minute order dated 12/2/2015</b> from status hearing continued the matter to 7/6/2016, and states counsel requests a continuance due to an option on the real property. No appearance is necessary on 7/6/2016 if the I&A is filed at least two court days prior.										
<b>Cont. from 120215</b>	Letters issued 07/06/15.	<ol style="list-style-type: none"> <li>1. Need inventory and appraisal.</li> <li>2. Declaration filed 6/27/2016 states that documents are provided evidencing the contract of sale, the escrow and extension of escrow regarding the real property. However, it appears no supporting documents were attached or filed with the status report.</li> <li>3. Status report filed 6/27/2016 report is not signed by the either of the fiduciaries (Don Lemly and/or Linda Jenvey), as required pursuant to Prob C §1021, 1023).</li> </ol>										
<b>Aff.Sub.Wit.</b>												
<b>Verified</b>	<b>Minute order from 07/01/15</b> set this status hearing regarding filing of the inventory & appraisal.	<table border="1"> <tr><td><b>Reviewed by:</b></td><td>JF/SEF</td></tr> <tr><td><b>Reviewed on:</b></td><td>6/30/2016</td></tr> <tr><td><b>Updates:</b></td><td></td></tr> <tr><td><b>Recommendation:</b></td><td></td></tr> <tr><td><b>File</b></td><td>12 - Lemley</td></tr> </table>	<b>Reviewed by:</b>	JF/SEF	<b>Reviewed on:</b>	6/30/2016	<b>Updates:</b>		<b>Recommendation:</b>		<b>File</b>	12 - Lemley
<b>Reviewed by:</b>	JF/SEF											
<b>Reviewed on:</b>	6/30/2016											
<b>Updates:</b>												
<b>Recommendation:</b>												
<b>File</b>	12 - Lemley											
<b>Inventory</b>												
<b>PTC</b>												
<b>Not.Cred.</b>												
<b>Notice of Hrg</b>	<b>Declaration of personal representatives filed 11/23/2015 stated</b> the only asset of the estate is the decedent's share of the <i>Dusan Misita Living Trust</i> . The only asset of the trust is a parcel of real property that is in the process of being sold with an anticipated sale date of 5/27/2016.											
<b>Aff.Mail</b>												
<b>Aff.Pub.</b>												
<b>Sp.Ntc.</b>												
<b>Pers.Serv.</b>												
<b>Conf. Screen</b>	<b>Declaration of personal representatives re: status of filing inventory and appraisal (I&amp;A) filed 6/27/2016 states</b> the sale date has been extended to 11/15/2016. The I&A was required to be filed before 12/2/2015. Until the real property is sold and proceeds are distributed to this estate, the administrators cannot provide an I&A.											
<b>Letters</b>												
<b>Duties/Supp</b>												
<b>Objections</b>												
<b>Video Receipt</b>												
<b>CI Report</b>												
<b>9202</b>	Documents are provided evidencing the contract of sale, the escrow and extension of escrow regarding the real property owned by the trust. At such time as the real property is sold and the proceeds distributed to the decedent, the I&A will be filed with the court. It is anticipated the I&A will not be filed until on or after 11/15/2016.											
<b>Order</b>												
<b>Aff. Posting</b>												
✓ <b>Status Rpt</b>												
<b>UCCJEA</b>												
<b>Citation</b>												
<b>FTB Notice</b>												

## Petition for Appointment of Guardian of the Person

		See petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Minute Order 5/25/16:</u> Examiner notes provided in open court. The Court grants one last continuance for the defects to be cured.  <u>Note:</u> It appears all service defects have now been cured.  <u>Note to document preparer:</u> For future reference, please use <u>only</u> the Mandatory Judicial Council Notice of Hearing Form GC-020 and the proofs of service that go with that form for guardianship matters instead of stand-alone proofs of service, as they do not meet Probate Code requirements alone.	
Cont.d from 120915, 012016, 030216, 041316, 052516				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			x
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
		Reviewed by: skc		
		Reviewed on: 6/30/16		
		Updates:		
		Recommendation:		
		File 13 – Knighton		



## Probate Status Hearing RE: Filing of an Inventory and Appraisal

<b>DOD: 10/2/2015</b>	<b>DOLORES KENNEDY</b> , mother, was appointed administrator with full IAEA without bond on 2/3/2016.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	Letters issued 2/5/2016.	
	Inventory and appraisal filed 2/29/2016 shows estate valued at \$175,000.00.	<b><u>OFF CALENDAR</u></b> Final I&A filed 2/29/2016.
<b>Cont. from</b>		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input type="checkbox"/> <b>Verified</b>		
<input checked="" type="checkbox"/> <b>Inventory</b>		
<input checked="" type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input type="checkbox"/> <b>Notice of Hrg</b>		
<input type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> SEF
		<b>Reviewed on:</b> 6/30/2016
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 14- Kennedy</b>

## Petition for Appointment of Guardian of the Person

		<b>NO TEMPORARY REQUESTED</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>CORINA TORRES</b> , maternal aunt, is Petitioner.	<b>Continued from 6/1/2016.</b> Minute Order shows a special appearance by Attorney Katy Esparza, and states counsel is directed to obtain the examiner notes online.
<b>Cont. from 060116</b>			1. Need proof of personal service of the Notice of Hearing with a copy of the Petition for Appointment of Guardian, or Consent to Appointment of Guardian and Waiver of Notice, or a Declaration of Due Diligence, for: <ul style="list-style-type: none"> <li>Urbano Magana, father, as reported to Court Investigator;</li> </ul> and/or <ul style="list-style-type: none"> <li>Oscar Lopez Gonzalez, father, as listed on birth certificate.</li> </ul>
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		2. Proof of Service by Mail of the Notice of Hearing filed 6/6/2016 does not show that a copy of the Petition for Appointment of Guardian was served with the notice as required to: <ul style="list-style-type: none"> <li>Sara Gonzalez, paternal grandmother listed in Child Information Attachment.</li> <li>Rafael Torres, maternal grandfather;</li> <li>Roberto Lopez (<b>Note:</b> His relationship to the minor is unspecified; need clarification from Petitioner as to his identity.)</li> </ul>
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		3. Need proof of service by mail of the Notice of Hearing with a copy of the Petition for Appointment of Guardian, or Consent to Appointment of Guardian and Waiver of Notice, or a Declaration of Due Diligence: <ul style="list-style-type: none"> <li>paternal grandfather; (father of Urbano Magana);</li> <li>paternal grandmother (mother of Urbano Magana);</li> <li>Maternal grandmother.</li> </ul>
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		<b>Reviewed by:</b> LEG
<input type="checkbox"/>	<b>Aff.Mail</b>	X	
<input type="checkbox"/>	<b>Aff.Pub.</b>		<b>Reviewed on:</b> 6/29/16
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>	X	<b>Updates:</b>
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		<b>Recommendation:</b>
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		<b>File 17- Lopez</b>
<input type="checkbox"/>	<b>Video Receipt</b>		
<input checked="" type="checkbox"/>	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>Clearances</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input checked="" type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		

Petitioner: Nadine Gonzalez (pro per)

Petitioner: Mario Gonzalez, JR (pro per)

Objector: Daisy Banda (pro per)

## Petition for Appointment of Guardian of the Person

		<b><u>TEMPORARY EXPIRES 7/6/2016</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>NADINE RENA GONZALEZ and MARIO GONZALEZ JR</b> , step-grandmother and paternal grandfather, are petitioners	
<b>Cont. from 060116</b>		Please see petition for details.	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	W/	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input checked="" type="checkbox"/>	<b>Pers.Serv.</b>	W/	
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input checked="" type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by:</b> KT
			<b>Reviewed on:</b> 6/29/16
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 18- Gonzalez</b>

<b>DOD: 01/20/2016</b>		<b>ALMA D. LOUSBERG</b> , ex-spouse, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Note:</b> Page #20 is a related case. It is the Petition for Appointment of Guardian of the Estate filed by Alma D. Lousberg, mother/petitioner.  <b>Note:</b> Petitioner originally filed in Pro Per however has now retained Catherine Amador.  <b>Minute Order of 05/12/2016:</b> Examiner notes provided in open court.  <b>Minute Order of 06/01/2016:</b> Counsel requests time to address the notice issues.  <b>As of this Examiner's review on 06/30/2016, there has been nothing new filed.</b>  <b>The deficiencies with the pleadings include, but are not limited to, the following:</b>  1. It does not appear that the petitioner has the standing to petition the Court as she is not the successor in interest. The minor child, Emma Lang's is the successor in interest therefore the duly appointed guardian of her estate can petition on her behalf.  2. This petition can only pass the decedent's property to the successor in interest any other requests regarding the real property should be made in the Guardianship of the Estate case.  <p style="text-align: center;"><b>Please see additional page</b></p>
		40 days since DOD	
		No other proceedings	
<b>Cont. from 051216, 060116</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	I&A – <b>NEED</b>	
<input checked="" type="checkbox"/>	<b>Verified</b>	Will dated: 03/20/2015	
<input type="checkbox"/>	<b>Inventory</b>	x	
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b>	x	
<input type="checkbox"/>	<b>Aff.Mail</b>	x	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input type="checkbox"/>	<b>Order</b>	x	
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by:</b> LV <b>Reviewed on:</b> 06/30/2016 <b>Updates:</b> <b>Recommendation:</b> <b>File 19- Lang</b>

3. Petition was opened using a Fee Waiver. Filing fees are considered cost of administration and must be paid prior to distribution of property. Filing fee of \$435 will be due prior to distribution of the real property should the Court grant this petition.
4. Need original will to be deposited with the Court pursuant to Probate Code §8200(a)(1).
5. Need Inventory and Appraisal.
6. Attachment 11 does not include the decedent's interest in real property.
7. Need Notice of Hearing.
8. Need proof of service of the Notice of Hearing on Emma Lang.
9. Need Order. Local Rule 7.1 states a proposed Order shall be submitted with all pleadings that request relief. If the proposed order is not received in the Probate Filing Clerk's Office ten (10) days before the scheduled hearing, a continuance may be required.

**20 Emma Lang (GUARD/E) Case No. 16CEPR00433****Attorney Amador, Catherine A. (for Alma D. Lousberg - Petitioner – Mother)****Petition for Appointment of Guardian of the Estate (Initial)**

<b>Age: 11</b>		<p><b><u>TEMPORARY DENIED ON 06/01/2016</u></b></p> <p><b>ALMA D. LOUSBERG</b>, mother, is petitioner and requests appointment as Guardian of the Estate without bond.</p> <p>Father: <b>JOHN PAUL LANG</b>, Deceased</p> <p>Paternal Grandfather: Dennis Lang, served by mail on 06/06/2016 Paternal Grandmother: Deceased</p> <p>Maternal Grandfather: Deceased Maternal Grandmother: Josefina Rios, served by mail on 06/06/2016</p> <p><b>Estimated value of the Estate - \$0</b></p> <p><b>Petitioner states:</b> there is currently no money in the estate of Emma Lang, minor. Her father was violently murdered in January 2016. Decedent left a Will naming petitioner as Executor and leaving his entire estate to the minor. The entirety of the decedent's estate was a home located in Fresno and furnishings contained within. Petitioner states she is currently in the process of admitting Decedent's will to Court in a separate case and requesting that the Court allow her to sell the home. All funds will be inherited to the child, since the minor is 11 years of age, it will be necessary for petitioner to administer any and all bank accounts for her. Since there are no funds for petitioner to administer at this time, she does request that the Court grant her request to waive any and all bonds that might otherwise be necessary.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> Page #19 is a related case. It is the Petition to Determine Succession filed by Alma D. Lousberg, mother/petitioner.</p> <p><b>Note:</b> Petitioner originally filed in Pro Per however has now retained Catherine Amador.</p> <p><b>Minute Order of 06/01/2016:</b> Trailing the John Lang estate matter, 16CEPR00367.</p> <p><b>The following issues remain:</b></p> <ol style="list-style-type: none"> <li>1. Absent showing of good cause, it is the policy of the Court to block all funds in a guardianship estate. Petitioner states the estimated value of the estate is zero. Need clarification regarding the estimated value of the estate.</li> <li>2. #9c. of the Order states that \$80,000.00 to be deposited into a blocked account. Is this in addition to the real property? Need clarification.</li> </ol> <p><b><u>Please see additional page for Status Hearings</u></b></p>	
<b>Cont. from 060116</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input type="checkbox"/>	<b>Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input type="checkbox"/>	<b>Notice of Hrg</b>			X
<input type="checkbox"/>	<b>Aff.Mail</b>			X
<input type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input type="checkbox"/>	<b>Pers.Serv.</b>			N/A
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>			
<input checked="" type="checkbox"/>	<b>Letters</b>			
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			
<input type="checkbox"/>	<b>9202</b>			
<input checked="" type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input type="checkbox"/>	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input type="checkbox"/>	<b>FTB Notice</b>			

<b>Reviewed by:</b> LV
<b>Reviewed on:</b> 06/30/2016
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 20- Lang</b>

**Note:** If the petition is granted status hearings will be set as follows:

- **Wednesday, 08/10/2016 at 9:00a.m. in Dept. 303** for the filing of the Receipt for Blocked Account **and**

**Wednesday, 12/07/2016 at 9:00a.m. in Dept. 303** for the filing of the inventory and appraisal **and**

- **Wednesday, 09/06/2017 at 9:00a.m. in Dept. 303** for the filing of the first account and final distribution.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.

DOD: 02/14/2016	RITA RODRIGUEZ, CHRITINA M. ESQUIVEL (BRAVO), ALBERT G. MORENO, JR., ESTELLA M. GONZALES, GLORIA G. MORENO, and ANTHONY G. MORENO, children are petitioners.	NEEDS/PROBLEMS/COMMENTS:  <b>Minute Order of 06/02/2016: Counsel represents that they only have a copy of the will, with no original to lodge; Counsel is directed to file a verified declaration.</b>
Cont. from 060216		
Aff.Sub.Wit.	40 days since DOD	<p>1. Need original will to be deposited with the Court pursuant to Probate Code §8200(a)(1). <b>Note:</b> Declaration filed 06/20/2016 states an original will could not be located however a copy of the decedent's will is attached. A Lost Will cannot be probated in this Summary Proceeding. Decedent's will devises both real and personally property to each of the six children. It appears that each of the six children would take equally through intestate succession.</p> <p>2. Declaration of Petitioners filed 06/20/2016 states Exhibit "B" is attached as a revised Attachment 11 however it is not attached to the Declaration. Therefore the following issues remain:</p> <ul style="list-style-type: none"> <li>Attachment 11 does not provide the decedent's interest in the real property.</li> <li>Attachment 11 does not include the APN of the real property pursuant to Local Rule 7.12.1.</li> </ul>
✓ Verified	No other proceedings	
✓ Inventory	I&A - \$90,000.00	
PTC		
Not.Cred.		
✓ Notice of Hrg	Will dated: 01/22/1988 devises both real and personal property to all six children equally.	
✓ Aff.Mail		
Aff.Pub.	Petitioners requests Court determination that decedent's interest in real property located in Fresno County pass 1/6 <sup>th</sup> interest to each child.	
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 06/29/2016
		Updates:
		Recommendation:
		File 21- Moreno



## Petition for Order Approving Modification of Trust Terms

		<p><b>STEPHEN C. BETTENCOURT</b>, Surviving Settlor, is Petitioner and states:</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
		<p>Petitioner and his wife Janet C. Bettencourt established the Bettencourt Family Trust dated 4/14/08. Stephen and Janet had no children of their marriage; however, Janet had two children from a previous marriage, Patrick C. Mulhern and Summer M. Frundel, who are the contingent beneficiaries of the trust. Janet died 1/10/16.</p>	<p>1. <b>Although Patrick Mulhern and Summer Frundel consent to the petition, they did not waive notice of hearing on the petition. Therefore, need proof of service of Notice of Hearing per Probate Code §17203 at least 30 days prior to the hearing on the above beneficiaries or waivers of notice.</b></p>
	<b>Aff.Sub.Wit.</b>		
✓	<b>Verified</b>	<p>The trust is an intervivos revocable trust created for the benefit of Stephen and Janet during their joint lives. The trust names Stephen and Janet as co-trustees, with power to appoint successor trustees during their lives. Following Janet's death, Stephen is now the sole trustee.</p>	
	<b>Inventory</b>		
	<b>PTC</b>	<p>Upon the first of the settlors to die, the trust was to divide into as many as three sub-trusts: a survivor's trust, a marital trust, and a bypass trust. Petitioner states creating subtrusts no longer furthers the settlors' intent. Attorney Richard M. Aaron, Stephen and Janet's estate-planning attorney, met with Stephen and Janet to discuss their estate-planning options. See Declaration attached as Exhibit B. Mr. Aaron explained that the creation of subtrusts has historically been done for three reasons: use of estate tax exemption amounts, protection for surviving spouse against creditors, or for assurance that the disposition of the deceased spouse's share cannot be changed by the surviving spouse.</p>	
	<b>Not.Cred.</b>		
	<b>Notice of Hrg</b>	x	
	<b>Aff.Mail</b>		
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
	<b>Letters</b>		
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
	<b>9202</b>		
✓	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		
		<p>In 2008, the settlors' estate exceeded the exclusion amount for gift and estate transfers; therefore, creating subtrusts was a prudent decision for significant transfer tax savings. In 2010, the federal government enacted a portability law, and the American Taxpayer Relief Act of 2012 made portability permanent and also increased the estate and gift tax exemption amount.</p>	
		<p align="center"><b><u>SEE PAGE 2</u></b></p>	<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 6/30/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 22- Bettencourt</b></p>

**Page 2**

**Petitioner states** in light of the increased exemption amount and the portability of the estate tax exemption, subtrusts are no longer necessary to minimize estate taxes, and in fact, will likely actually make the family worse off from an income tax standpoint, as passing Janet's assets to the bypass trust will cause them to be excluded from Stephen's estate for tax purposes and eliminate the possibility of receiving stepped-up income tax basis in the assets for future generations when Stephen dies.

In addition, elimination of creation of subtrusts will significantly reduce administrative costs and therefore preserve more of the trust estate for the beneficiaries.

When Mr. Aaron met with Stephen and Janet, the only reason they wanted a trust that required mandatory division was for tax planning purposes. They trusted each other to carry out the plan to divide the trust equally between Patrick and Summer.

Stephen states he has no intention of changing the disposition of the trust; he only wants to amend to simplify the trust and save money. Patrick and Summer are aware of this petition and consent to the amendments proposed.

See petition for proposed modification language.

Petitioner Walsh, Summer Kasandra (Pro Per Petitioner)

## Petition for Letters of Special Administration

<b>DOD: 7/13/14</b>		<p><b>SUMMER KASANDRA WALSH</b>, Daughter, is Petitioner and requests appointment as Special Administrator without bond, with authority to sign an Affidavit Re Real Property of Small Value on behalf of the decedent.</p> <p>Decedent died intestate</p> <p>Residence: Reedley, CA</p> <p>Estimated value of estate: Real property: \$16,667.00</p> <p><b>Petitioner states</b> the decedent died intestate 7/13/14. There were no debts or debtors at the time of his death. His only asset was a 1/3 interest in a piece of bare land that his wife Susan Kaye Mott owned at the time of her death on 1/11/09 as her sole and separate property.</p> <p>The property was valued by Probate Referee Steven Diebert at \$40,000.00. There were no debts or debtors at the time of her death.</p> <p>Had probate been done shortly after her death, the property would have been divided 1/3 to her husband, Johnny Mott, and 2/3 to her children, Summer Walsh and Jimmie N. Mott. But nothing was done.</p> <p>Petitioner requests appointment as special administrator to enable her to sign the DE-305 Affidavit Re Real Property of Small Value concerning her mother's estate on behalf of her father, who was living at the time of her mother's death.</p> <p>With the recording of the proposed Affidavit, the estate of Susan Kaye Mott would be closed, and Summer and Jimmie could then file an Affidavit re their father's 1/3 share.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> Examiner has inserted an expiration date of 1/4/17 on the proposed Order and Letters of Special Administration.</p> <p><b>Note:</b> This petition was filed with a Request to Waive Court Fees, which was set for hearing at Page B. If fees are not waived, filing fee of \$200.00 will be due.</p>	
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			

<b>Reviewed by:</b> skc
<b>Reviewed on:</b> 6/30/16
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 23A- Mott</b>

Petitioner Walsh, Summer Kasandra (Pro Per Petitioner)

## Fee Waiver Hearing

		NEEDS/PROBLEMS/COMMENTS:  <u>CONFIDENTIAL</u>
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 6/30/16
		Updates:
		Recommendation:
		File 23B- Mott

Attorney William H. Coleman (for Petitioner David Proffitt)

## Petition for Probate of Lost Will and for Letters Testamentary; Authorization to Administer Under the IAEA

DOD: 5/1/2016		DAVID PROFFITT, brother and named Executor without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Full IAEA: OK	<p><b>Note:</b> Proposed personal representative is a resident of North Carolina. Probate Code § 8571 states notwithstanding a waiver of bond, the Court in its discretion may require a non-resident personal representative to give a bond in an amount determined by the Court. Court may require bond in the sum of <b>\$152,000.00</b>.</p>
Cont. from			
✓	Aff.Sub.Wit.	Lost Will Dated: 11/25/1994	<p><b>Note:</b> If <i>Petition</i> is granted, Court will set Status Hearings as follows:</p> <ul style="list-style-type: none"> <li>Monday, August 8, 2016 at 9:00 a.m. in Dept. 303, for filing proof of bond, if Court requires bond;</li> <li>Tuesday, December 6, 2016 at 9:00 a.m. in Dept. 303 for the filing of the final inventory and appraisal; and</li> <li>Wednesday, September 6, 2017 at 9:00 a.m. in Dept. 303 for the filing of the first account and/or petition for final distribution.</li> </ul>
✓	Verified		
	Inventory	Residence: Fresno	<p>Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.</p>
	PTC		
	Not.Cred.	Publication: Business Journal	<p><b>Reviewed by:</b> LEG</p> <p><b>Reviewed on:</b> 6/30/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 24- Proffitt</b></p>
✓	Notice of Hrg		
✓	Aff.Mail	<p><b>Estimated value of the Estate:</b></p> <p>Real property - \$152,000.00</p> <p>Total - \$152,000.00</p>	
✓	Aff.Pub.		
	Sp.Ntc.	Probate Referee: Steven Diebert	
	Pers.Serv.		
	Conf. Screen	<p><b>Petitioner states:</b> Petitioner and his wife waive bond in this matter, and request that bond not be required even though they recently moved to Wake Forest, North Carolina, as they are the only heirs of the estate and sole beneficiaries under Decedent's Will, which waives bond for the Petitioner as named Executor.</p>	
✓	Letters		
✓	Duties/Supp	<p><i>~Please see additional page~</i></p>	
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

**Declaration of William H. Coleman Re Lost Will filed 5/25/2016 states:** He was the attorney for the Decedent and represented her in her capacity as trustee of her parent's trust; he was the also the attorney for Decedent's parents; the Petitioner notified him of Decedent's death and provided him with a copy of her Will dated 11/25/1994, which Petitioner found after searching Decedent's residence; Decedent relied heavily on her brother for business-related matters as well as her personal and financial matters; Decedent never asked him to revise, modify, or restate her Will while working with her from 2010 until her death; members of his firm made efforts to locate the witnesses of Decedent's Will; *[one witness was located, and a Proof of Subscribing Witness was filed 6/27/2016]*; the photocopy of Decedent's Will attached to the *[Petition and the Declaration]* is, based on information and belief, believed to be the Last Will and Testament of the Decedent.

**Declaration of David Allan Proffitt Re Lost Will filed 5/25/2016 states:** His sister, the Decedent, had a will drafted in 1994 when she resided in Seaside, California, specifically to address the needs of a guardianship for her minor daughter. Decedent's daughter passed away on 2/9/2010 at age 16; to his knowledge, Decedent never had her 11/25/1994, Will revoked, modified, or changed; Decedent relied on him for certain matters and would have discussed with me matters concerning her estate planning and business-related affairs; it is his belief that the Decedent was aware of the contents of the Will and that it continued to reflect her wishes even after her daughter's death; he remained in periodic contact with his sister until the time of her death, and it is his belief that she did not intend to make a new will and that she meant her 11/25/1994 Will to be her last Will and testament; he and his wife are the beneficiaries under the Will, and are her only next of kin; he would be her sole heir under the laws of intestate succession; he has made a diligent search of his sister's home for the original Will dated 11/25/1994, and I have been unable to locate such original; the photocopy of the Decedent's Will attached to the *[Petition and the Declaration]*, is a true and correct copy of the Decedent's last Will dated 11/25/1994, signed in my presence on that date by Decedent.

Attorney Steven F. Salazar (for Petitioner Kimiko Okahata, Administrator)

**Petition for Settlement of First and Final Account and for Final Distribution  
and Allowance of Statutory Attorney's Fees and for Reimbursement of Costs  
of Administration**

<b>DOD: 8/27/2015</b>		<b>KIMIKO OKAHATA</b> , sister-in-law, and Administrator, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from 062216</b>		<b>Account period: 8/27/2015 – 4/30/2016</b>	<b>OFF CALENDAR</b>
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	Accounting - \$417,894.56	<b>Order Settling and Approving First and Final Account filed 6/22/2016.</b>
<input checked="" type="checkbox"/>	<b>Verified</b>	Beginning POH - \$410,684.39	
<input checked="" type="checkbox"/>	<b>Inventory</b>	Ending POH - \$411,361.23 (50% interest in real property; and \$211,361.23 cash)	
<input checked="" type="checkbox"/>	<b>PTC</b>	Administrator - <b>waives</b>	
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>	Attorney (statutory) - \$11,308.04	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	Costs - \$1,485.50 (filing fees, probate referee, publication, certified copies)	
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>	Closing - \$1,500.00 (reserve for payment of any tax liabilities, tax services)	
	<b>Conf. Screen</b>	Distribution pursuant to intestate succession and Assignments of Interest filed on various dates by all estate heirs is to:	<b>Note:</b> Related Case 15CEPR00957 is pending for the Estate of <b>TADASHI OKAHATA</b> , this Decedent's brother, whose estate owns the other <b>50%</b> interest in the subject real property. Status hearing is set in 15CEPR00957 for the filing of the final account on <b>2/2/2017</b> .
	<b>Letters</b>   120115	<ul style="list-style-type: none"> <li>• KIMIKO OKAHATA – 100% interest in real property on 4424 W. Madison;</li> <li>• NORMA NISHIOKA – \$32,835.70 cash?;</li> <li>• MINEO YAMATAKE – \$32,835.70 cash?;</li> <li>• NANCY KONO – \$5,472.62 cash?;</li> <li>• MARSHA KUNISAKI – \$5,472.62 cash?;</li> <li>• AMY TANI – \$5,472.62 cash?;</li> <li>• KAREN TEBBS – \$5,472.62 cash?;</li> <li>• ARLENE KUBOTA – \$5,472.62 cash?;</li> <li>• JOYCE KAWAMOTO – \$5,472.62 cash?;</li> <li>• JUDY NOLEN – \$16,417.85 cash?;</li> <li>• PEGGY VESSEL – \$16,417.86 cash?;</li> <li>• DOUG YAMAOKA – \$8,208.93 cash?;</li> <li>• ALAN YAMAOKA – \$8,208.93 cash?;</li> <li>• DALE YAMAOKA –</li> <li>• ELAINE YAMAOKA –</li> <li>• TANIA VONG – \$16,417.86 cash;</li> <li>• JANEL OKAHATA – \$16,417.86 cash.</li> </ul>	
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
<input checked="" type="checkbox"/>	<b>FTB Notice</b>		<b>Reviewed by:</b> LEG <b>Reviewed on:</b> 6/29/16 <b>Updates:</b> <b>Recommendation:</b> <b>File 26- Okahata</b>

## Petition for Appointment of Probate Conservator of the Estate

		<b>Temporary Expires 7/6/16</b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		<b>ANGELA WILBANKS ANDERSON and ROBERT C. WILBANKS</b> , children, are petitioners		<b>Court Investigator Advised Rights on 6/7/16.</b>	
<b>Cont. from 062216</b>		Please see petition for details		<b>Continued from 6/22/16.</b>	
	Aff.Sub.Wit.		<b>Court Investigator Report filed on 6/15/16</b>	<b>Minute order states</b> counsel is to submit declaration regarding request of monthly allowance for Bobby Wilbanks at least 1 week before hearing. Revised order needed.	
✓	Verified			1. Petition requests powers under Probate Code §2591. Local Rule 7.15.2 states each individual power requested must be justified by, and narrowly tailored to the specific circumstances of the case. The court may require more information regarding the requested powers.	
	Inventory			2. Need revised order.	
	PTC			3. Need Letters	
	Not.Cred.			<b>Reviewed by:</b> KT	
✓	Notice of Hrg		<b>Note:</b> Minute order dated 6/22/16 set the following status hearings:	<b>Reviewed on:</b> 6/29/16	
✓	Aff.Mail	W/	<ul style="list-style-type: none"> <li><b>Wednesday, July 20, 2016</b> at 9:00 a.m. in Department 303, for the filing of the bond (for Robert E. Wilbanks)</li> <li><b>Wednesday, November 2, 2016</b> at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.</li> <li><b>Wednesday, August 30, 2017</b> at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution.</li> </ul>	<b>Updates:</b>	
	Aff.Pub.			<b>Recommendation:</b>	
	Sp.Ntc.			<b>File 28B- Wilbanks</b>	
✓	Pers.Serv.				
✓	Conf. Screen				
	Letters	X			
✓	Duties/Supp				
	Objections				
	Video Receipt	X			
✓	CI Report				
	9202		Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.		
	Order				
	Aff. Posting				
	Status Rpt				
	UCCJEA				
✓	Citation				
	FTB Notice				



## Petition for Visitation

			<b>GINA MARES</b> , Mother, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
			<b>GAIL RIOS</b> (Paternal Aunt)	<b><u>CONTINUED TO</u></b> <b><u>7/20/16 @ 8:30AM IN</u></b> <b><u>DEPT. 54</u></b>
			<b>and ESTHER RIOS</b> (Paternal Great-Grandmother), were appointed Co-Guardians on 1/17/08. - <i>Gail Rios was personally served with Notice of Hearing on 4/26/16.</i>	
<b>Cont. from 060716</b>			<b>See petition for details.</b>	<p><b>Note:</b> On 6/7/16, Petitioner appeared and Co-Guardians Gail Rios and Esther Rios appeared; however, the matter was continued to 7/6/16 for proper service to be completed on all parties. On 6/27/16, Petitioner Gina Mares requested further continuance to 7/20/16.</p> <p>As of 6/27/16, the following issues remain:</p> <ol style="list-style-type: none"> <li>1. Need proof of service of proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Visitation on Minor Angel Rios.</li> <li>2. The Court may require proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Visitation on Nathan Rios (Father).</li> </ol>
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
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<input type="checkbox"/>	Conf. Screen			
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<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
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<input type="checkbox"/>	9202			
<input type="checkbox"/>	Order			
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<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
				<b>Reviewed by:</b> skc
				<b>Reviewed on:</b> 6/27/16
				<b>Updates:</b>
				<b>Recommendation:</b>
				File 1 – Rios